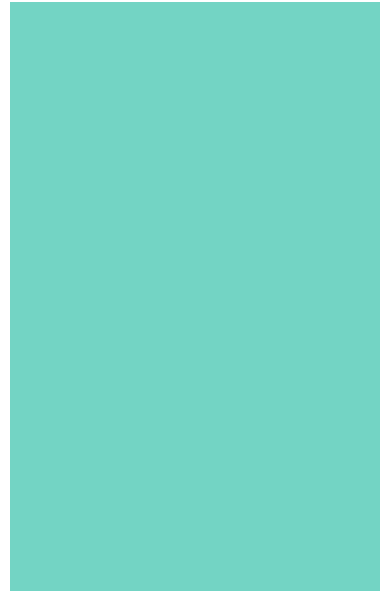


# Bringing Energy Home

Understanding how people think about energy in their homes



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**September 2010**

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*The Sustainable Energy Authority of Ireland (SEAI) has a mission to play a leading role in transforming Ireland into a society based on sustainable energy structures, technologies and practices.*

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## PREFACE



This publication is an exploration of how Irish people think about energy use and energy use reduction in their homes.

We have a lot of experience to draw upon – we have been talking to householders and energy consumers for many years, making them aware of their choices. We have insights from national campaigns such as Power of One, and from engaging householders in the National Smart Metering trial. Most of all, the huge current interest in energy efficiency driven by Government’s Home Energy Saving (HES) scheme gives us a great opportunity. Every week 1,000 people are availing of the HES grants to upgrade their home and reduce their energy bills. This report is based on the opinions of almost 10,000 of these people, and they tell us much about consumer attitudes to the energy business.

Attitudes to energy have changed. First of all, people know what it is. A few years ago, it was very much a marginal issue in politics and society. There were a few people who cared about ‘energy conservation’ (usually to the annoyance of their families), but it was seen as a fringe issue and most people had no awareness of and no interest in the subject. Saving energy was for the zealots.

That has all changed. Energy is now mainstream.

People are conscious of energy costs these days and do express an interest in energy use reduction. Many also understand the environmental dimension, and are expressing an interest in reducing their carbon footprint. Many actions are available to such people, from simple things like switching off or turning down, to more serious asks such as upgrading the insulation or heating system in their home. Our interest is in understanding better how to support people who want to take such actions, and how to persuade others to think about it too.

At the heart of it all is a paradox: energy efficiency should actually be a very easy sell. On paper it is one of the best investments in town, better return than any bank account, an easy and cheap way to save money while improving your comfort. It is also good for the country and for the environment.

And yet we don’t do it. We know from detailed analysis, and from our experiences every day, that there is huge untapped potential for improving efficiency and reducing costs. In broad terms we all use at least 25% more energy than we need. Most of us could halve our home heating costs by improving insulation and heating controls without any loss of comfort or convenience. Why don’t we?

There is plenty of research on this, and it resonates with what I think we all realise about our own behaviour. First, many people are simply not aware of their options and how much they could save, and of course don’t spend much time thinking about it. Also, even if one does look for new ways of doing things, it can be overwhelming to wade through the choices, the sales pitches, the promised savings, to find the right thing to do. This is becoming more true as interest in energy grows – more interest means more options for sale, and inevitably the risk of more cowboys entering the market too. How does a person know the good from the bad?

Probably the biggest challenge, though, is about money. In economic terms, improving my home makes absolute sense – I spend say €10,000 now and I save more than €500 per year for twenty five years, so overall I make money and get the immediate improved comfort and reduced carbon. But I have to spend now to save later, and it takes a long time for me to get my money back. Is it really that attractive when I have other demands on my money? How many people have a few thousand ready to spend, or an appetite to take out a loan for it?

This is where Government comes in. A financial incentive scheme such as HES does a lot more than simply making things cheaper, though of course that is central. It also stimulates awareness and interest - it puts the idea in people's minds. It makes the proposition less scary too – Government has chosen to prioritise and invest in this, it is signalling to people that it is a positive thing. This is particularly important when, as in HES, the incentive is used as an opportunity to emphasise quality and demand that good standards of work and service are the norm. People gain assurance from knowing that someone is watching over who is registered to do the work, what products and solutions are accepted. This further builds confidence.

And all of this together is creating momentum. Between HES and its sister programme, the Warmer Homes Scheme, which addresses fuel poverty, over 100,000 homes will have received an energy upgrade between 2009 and 2010. Every estate, every town, is involved, and by now everyone knows someone who has done something on their home insulation or heating system recently. This means you can ask your neighbours about how it went, would they recommend their contractor, was it worth the effort? There is healthy competition among the few thousand registered contractors, and the good ones are in demand.

Our survey results tell us what is motivating so many people to get active on energy. The core issues remain the same – money, comfort, environment. Different

people prioritise these differently, and there is also a degree of ebb and flow over time where certain issues are more to the forefront.

In this regard, it is interesting to look at the messages used in our awareness campaigns over the past decade. (see table below).

Environment has often been a focus and has, I think, been successful in establishing firmly the link between people's energy behaviour and the wider climate change issue. Maybe Hurricane Katrina made tangible what a future climate-uncertain world might look like, maybe coverage of East European gas supplies being switched off brought home the message of our dependence on others in heating and lighting our homes. The past few years have seen dramatic changes in awareness and concern over energy availability and cost.

But awareness and concern are not enough. What motivates real, solid action? You will see in this report evidence that broad environmental concern does not do this on its own, especially when it comes to spending thousands of euro on a home upgrade. We all remain focused on the financial dimension, particularly in these times. We also see in this dataset that comfort in our homes is a deep rooted, emotional issue for us, and one that can indeed lead us to act in quite strong ways.

Before presenting the findings of our large scale survey of HES participants, it is worth making a few broad, important points about the nature of energy

Year	Headline message	Theme
1999	Appliances – Simply Choose A or B Heating – Think Warm Thoughts	Buying a better appliance to reduce running costs Comfort at home
2000-02	You can Make a World of Difference	Environment and climate change with adverts linking to heating and appliance use
2003	Standby Energy - See Red / Switch Off Appliances – Choose A	Focus on needless waste of energy
2004	Take the Carbon Challenge	Launching a personal carbon calculator, climate message to the fore
2005	Combat Climate Change	Further emphasis on climate change
2006-08	Power of One – What One Change will you Make	Power of collective action (many people) or cumulative action (many different changes). Emphasis on cost savings.
2009	Power of One – Just One Change you can Make	Continued emphasis on cost savings – steering people towards stronger action



in homes and how people think and act. These emerge from Irish and international research, as well as our own experience as an organisation dedicated to engaging the public on energy issues and encouraging positive change.

First of all, **not all energy use is the same.** Crucially, the behaviours behind consumption of heat and electricity are quite distinct in a couple of important ways. First is the point of decision. Electricity use, namely for lighting and appliances, involves immediate decision-making many times a day – I switch on and I switch off. Heat is different, our energy use patterns are more influenced by settings that don't change – which radiators are left on, what are the timer settings on the central heating, at what temperatures are the thermostats set. Of course, the second point of decision-making for electricity is the time of purchase of electricity consuming equipment. We have had considerable success, through labelling, in fostering an awareness of the influence of equipment purchase on its running costs – people know that an A-rated machine uses less electricity than a B-rated one. It is important to access such decision-making, as the moment of purchase can fundamentally shape many years of consumption patterns.

But heat and electricity use are different, in terms of how people think about them, in another very important way. Electricity is essentially a consumer product, I buy it to run my television, light my room, and I can choose whether that service is worth the money or not. I probably have little idea of the exact cost, but I know running my washing machine costs money, and I can act accordingly.



There is much less sense of option in how people think about heat. It is a deeper, emotionally felt need, associated with basic well-being, shelter and security, not just comfort in the sense of luxury. For most people, a certain level of comfort is non-negotiable. Talking to people about reducing heat demand can often provoke a strong reaction, a refusal to 'compromise' when it comes to the conditions in which their family dwells. There is little sense of gradation - either my home is warm enough or it isn't. There is, of course, a distinct category where such basic needs are unaffordable. This is something we are actively addressing in many ways, but is for the most part not the subject of this particular report.

A second important principle – in most people's minds **energy use is not the same as energy cost.** Of course people understand there is a connection. But most of us have a poor sense of our energy bills, and an even poorer sense of what an individual action might cost. How much does it cost me to heat a room for a day? What does it cost if I press the hot water boost button? What does it save if I turn off a radiator? (Here the author confesses he knows none of the answers for his own home). This has a couple of consequences. One is a recent arrival in the context of energy supplier switching. People are now aware of supplier switching as an option (long present in oil, recently arrived in electricity, soon to arrive in gas), and will take action to reduce costs by 5 to 10%. However, many don't seem to realise how easy it would be to save the same or more through simple behavioural actions. Heat and comfort are tangible, a bi-monthly bill



is tangible when it arrives, but the connection between behaviour and cost-consequence is not.

These are general points, but of course not everyone is the same, and not everyone thinks in the same way about these things. But together they form into one centrally important aspect of heat and energy use in homes – the role of the home upgrade. Many people do see the idea of an upgrade, of addressing the homes efficiency, as an influencer and as a stand-alone decision point. They are right – a fairly simple upgrade can halve the heating bills of a previously inefficient home. Making upgrades easier, more attractive and more affordable is thus a centrally important way to improve overall energy efficiency and reduce costs, dependencies and environmental impacts at an individual and societal level.

As energy issues become more central to society, it is important to keep a focus on the people dimension of our goals and solutions. Pressures from climate change, energy security and cost and affordability are going to continue to drive energy policy and a need for strong action on many fronts. Government, the construction industry and all energy users will be required to participate together in a process of change that sees our dependence on imported, carbon intensive energy sources reduced immediately, and ultimately removed entirely. If we do not understand how people think of energy in their lives and how they weigh up decisions such as upgrading their homes, we will never succeed.

**Dr Brian Motherway**  
**Chief Operations Officer, SEAI**

# CHAPTER ONE

## WHO ARE THE PEOPLE PARTICIPATING IN THE HOME ENERGY SAVING SCHEME?

### HIGHLIGHTS

- Families and older people are more likely to participate in HES
- Participants' incomes are representative of national patterns
- Most participants choose the cheaper measures, with the average house spend (including grant) being €2,900

Participants in the Home Energy Saving scheme are an excellent representational group of people with an awareness of the importance of energy saving, and who take steps to upgrade their homes using various measures. The HES scheme continues to be extremely popular with homeowners with approximately 1,000 applications approved every week. Over 68,000 grants have been awarded since the scheme began in April 2009 (to September 2010), and SEAI is receiving 500 contacts every day by phone, web or post from the public and contractors.

But what do we know of the people? And what can we learn from them to encourage more people to participate and to develop further schemes for homeowners. We invited 26,000 people who had completed the HES scheme to participate in a short questionnaire, and over 9,000 did so, an encouraging response rate of 34%<sup>1</sup>.

Three broad questions have been illuminated by the survey results:

- » Who are the people who participate in HES?
- » What influences their decisions to participate and their choice of actions?
- » What are their experiences and level of satisfaction?

These questions are the themes of this and subsequent chapters in this report.



### THE PROFILE OF PARTICIPANTS

The results confirmed that people making the decision to apply for a HES grant come from a relatively wide cross section of society. The data shows that there are some instances of close convergence with the prevailing national averages and some of divergence:

Response sample	National population average
<p><i>Single adult household</i></p> <p>17%</p>	<p>33%</p>
<p><i>Retired</i></p> <p>17%</p>	<p>7%</p>
<p><i>Income</i></p> <p>Over 50% had household income of under €50,000</p>	<p>Median household income €46,600</p>

<sup>1</sup> Although the response sample is representative of the total population of HES participants, it is not of course representative of domestic energy consumers in general, as those surveyed were people who have already chosen to participate.

## SOCIO-ECONOMIC PROFILE

### The number of single adult households being reached is low

The survey reports a low incidence of participation by single adult households (a category that includes separated, widowed or single people). This may well be a factor of age and income.

### Retired people are strongly participating

By contrast, retired people are proving keen to participate in HES. We found that 17% of applicants were retired, more than twice the 7% of national households with retired people.

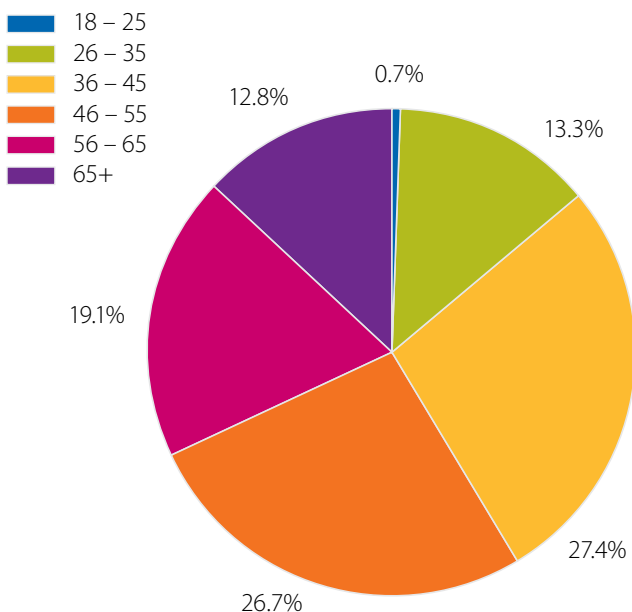
### Half of all participants had an income just above the median household income

As regards income levels, half of all participants have a gross household income under €50,000. Importantly, this was very much in line with the median household income of €46,600. This finding highlights for us that the scheme has the potential to appeal to a range of incomes and is not just for the better-off sections of society.

### Young people are proving hard to target

It is possible that this group is at the earlier stages of home purchase with lower levels of savings available.

## HOW OLD ARE YOU?



## PROPERTY OF RESPONDENTS

HES participants' homes are typical of the national mix in terms of both age and type. 56% of respondents had a loan or mortgage attached to their property, which is in line with the national average.

Summary	
Age of property	30% of respondents live in a pre-1970 house, broadly in line with the national average.
Property type	70% of respondents own detached and terraced houses. Apartments and semi-detached buildings are underrepresented.
Mortgage	In line with the national average.
Geographical spread	Dublin/Leinster below the national average.

Some points emerge from these patterns that may inform future programme design:

- » Apartments (and semi-detached homes) are proving harder to reach. Part of the reason is more to do with who is living in different homes – we have already seen that younger people, more likely to be apartment dwellers, are less likely to participate. However there are also some technical reasons that may be behind the pattern, such as difficulties in applying some insulation solutions to single apartments in a block. This is why the HES scheme looks for ways to encourage occupants of whole blocks to come together to participate.
- » The apparent under-representation of Leinster and particularly of the greater Dublin area in HES applications may be explained by geographically differentiated building construction techniques. Regions outside Leinster are known to have higher instances of cavity wall construction and thus are interested in cavity wall insulation, the second most popular HES grant measure. Insulating hollow block construction (more prevalent in Leinster) is only possible with external wall insulation or internal dry lining, both of which are more expensive and more

disruptive than blown cavity wall insulation. This could explain why only 2.8% of cavity wall insulation grants were applied for in Dublin and indeed why conversely nearly 40% of all external wall insulation was carried out there.

## WHAT HES MEASURES WERE UNDERTAKEN?

The process of HES grant support begins with customers choosing their preferred measure, e.g. heating system upgrade, and then applying in advance of having the work carried out. At this stage, customers must also identify their preferred contractor. After the grant is offered, a proportion of customers may not proceed at all or may only proceed with some of the measures.

The following table details what percentage of total participants undertook which measures:

	Applied for measure - % of total	Completed the measure - % of total
External Wall Insulation	4	2
Internal Wall Insulation	8	4
Oil Boiler & Controls	17	10
Gas Boiler & Controls	19	15
Heating Controls	7	4
Cavity Wall	61	53
Roof Insulation	84	70

Roof and cavity wall insulation are by far the most commonly applied for measures, and exhibit the highest levels of follow through. At the other end of the spectrum, only 4% of participants apply for external wall insulation, with only half of them actually installing it.

The average participant spend (including grant) is €2,900, reflective of the choice of lower cost measures by participants, such as cavity wall and attic insulation.

Clearly, the majority of the measures chosen are at the lower end of the cost scale. They are also typically the measures which are better known and understood, almost commodity services. Conversely the less favoured measures are typically more expensive and more invasive and, as we shall see later, may also face a barrier regarding perceived levels of disruption.

It is our aim to encourage HES participants to be more ambitious and to embark on deeper measures such as external and internal wall insulation. There may be a role for further awareness raising. There should also be a gradual growth in uptake as the scheme progresses and as people find positive experiences among neighbours and friends, so building confidence. However, clearly the cost of the measures is the principal barrier. The survey also highlights an interesting fact about how people fund HES measures.



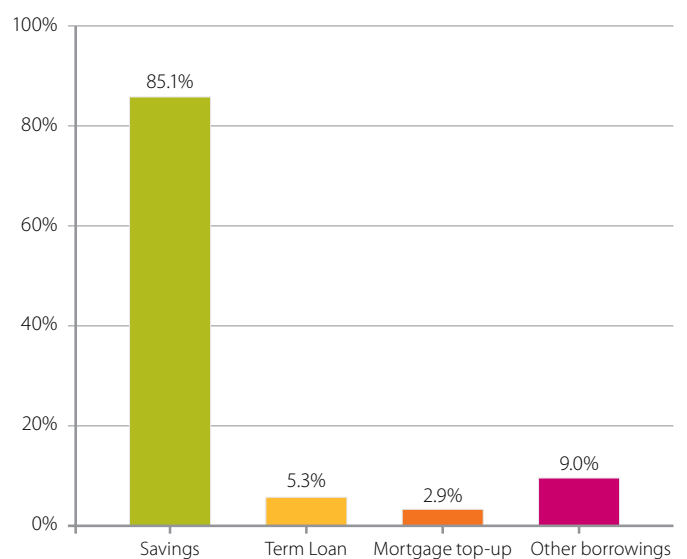
## HOW PARTICIPANTS FUND THEIR INVESTMENT

The vast majority of investments (85%) were funded through *savings* rather than through any form of borrowing. HES participants tend to draw on their own financial resources when making energy saving investments, no matter what their income. Few people took out specific loans or mortgage top-ups.

Lack of own funds was also cited as the main factor preventing those who applied for a measure from following through with the works. So availability of funds is (as of course would be expected) not only a major determinant of who applies for a grant, but also of whether applicants follow through with their planned measures<sup>2</sup>. Many sound investments in energy efficiency are clearly being foregone due to lack of upfront capital, and few people seem to avail (for whatever reason) of loan funding to overcome this.

## FINANCING MEASURES

How did you fund the measures (you may tick more than one answer)?



<sup>2</sup> Note that a separate programme, the Warmer Homes Scheme, funds the upgrade of homes in the 'fuel poverty' sector, where householders cannot afford to pay any part of the action. 25,000 such homes will be upgraded in 2010

## CHAPTER TWO

### WHAT MOTIVATES PEOPLE TO TAKE PART IN HES?



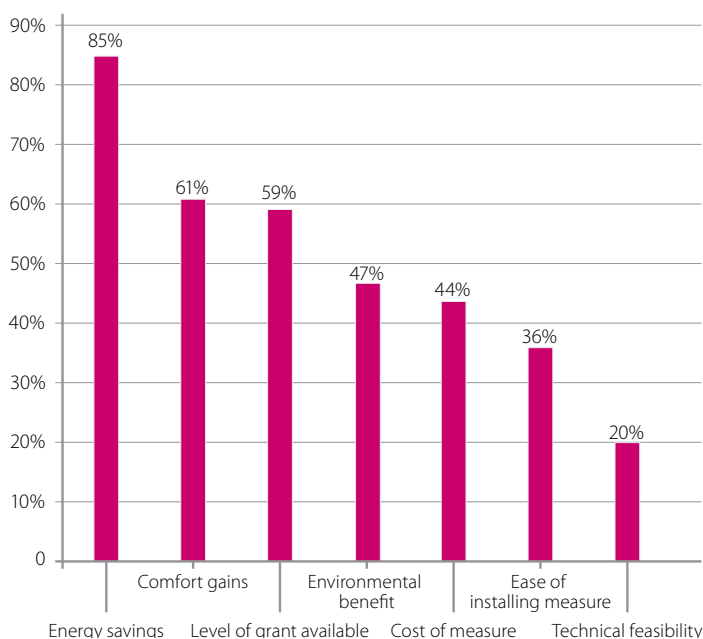
#### HIGHLIGHTS

- *Comfort gains and energy savings are the principal motivators for participation*
- *Environmental benefit is a relatively weak motivator*
- *65% believe the value of their home has increased after the upgrade*

What is the mix of factors that influences peoples' decision to apply and how did participants weigh up one measure against the other? And equally importantly – what prevented some applicants from following through on their intentions?

The more we know about the decision-making path, the better we can focus on ensuring it is as smooth as possible so as to widen the appeal of HES and future incentive/stimulus programmes.

#### KEY FACTORS INFLUENCING INVESTMENT IN ENERGY EFFICIENCY



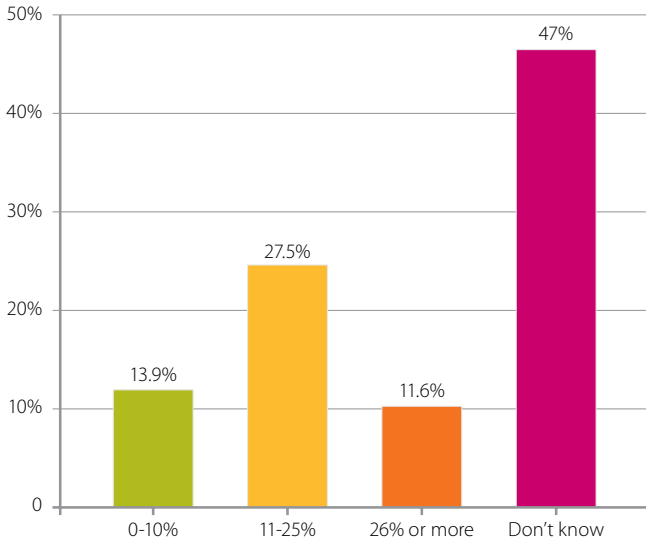
When asked what the main motivators were, a majority of participants cited energy savings followed by comfort gains and then the level of grant available.

It is rare that respondents cite environmental benefit as the principal reason for their decision to act. This finding is well aligned with research undertaken for the Power of One campaign which suggests that environment on its own is a weak motivator but is often cited as a dual motivator alongside cost savings. It is likely that the environmental dimension is something of an 'additional bonus' for some participants, but few seem likely act on this alone if there were not a financial or comfort gain as well.

#### IMPACT OF IMPROVEMENTS

We can observe an interesting interpretation of motivational factors when we examine them in conjunction with responses to a question about the impact of the improvements. As seen in the previous Figure, more respondents cited energy savings first as a motivator (85%) than cited comfort gains (61%). However, when asked about the impact of the new measures, over 90% of participants say that the improvement in comfort is excellent or good. On the other hand, when asked to put an estimate on the value of their energy savings, around half are unable or unwilling to even hazard a guess.

### WHAT ARE YOUR ESTIMATED ENERGY SAVINGS ON YOUR BILL ACHIEVED FROM THE INSTALLED MEASURE(S)?



People know in general terms that their energy bills will fall, but they find it impossible to put even a ballpark figure on it. It is well established that most householders do not know their energy costs (or prices) in any specific detail, and it is understandable that many would not be able to quantify the impact of home upgrades on these costs, especially when respondents have only recently had the works carried out. However, given its citation as a primary motivator, it remains somewhat surprising that people cannot put even an approximate value on the expected savings.

***The first tangible impact, once the works are completed, is clearly improved comfort. Even though there is a general expectation of cost savings it is not as directly felt immediately after the works are done – nor in fact can it be.***

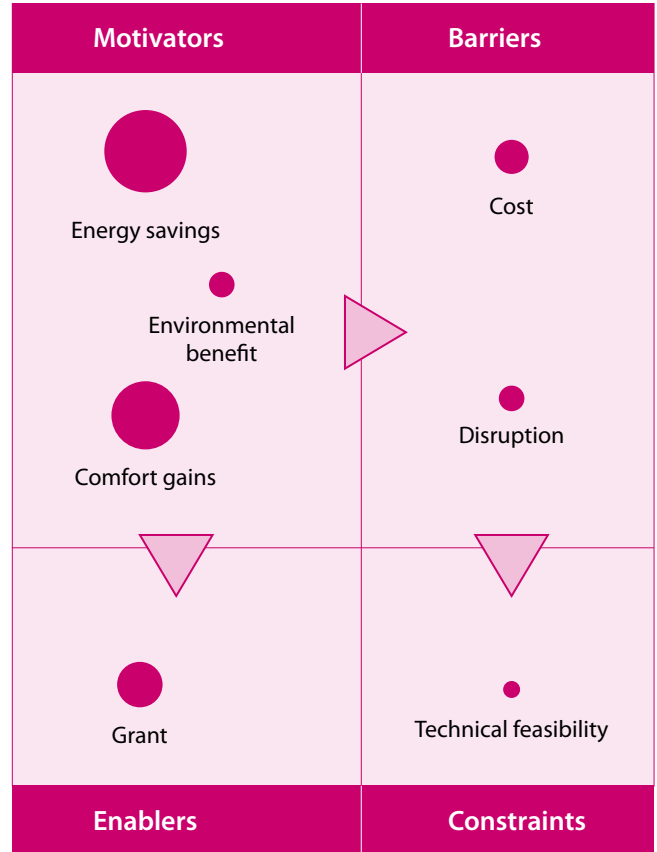
It is a common reaction among people who carry out upgrade works to notice the tangible comfort changes immediately. As one participant remarked:

*'I encouraged my neighbour to get his attic done and he kept coming back to me saying he couldn't believe how warm his house had actually become!'*

It reinforces the point that home heating has a strong emotional dimension, and people do not view upgrade options in pure economic terms. Notably, in the very cold snap experienced across Ireland in early 2010, SEAI saw a dramatic increase in calls and emails enquiring about the HES and other schemes. Call numbers rose hugely, peaking at 1,000 contacts per day in the height

of the bad weather. Clearly, on a snowy, sub-zero day it was a desire to feel warmer in the home rather than any specific expectation of future bill reductions, that motivated those calls.

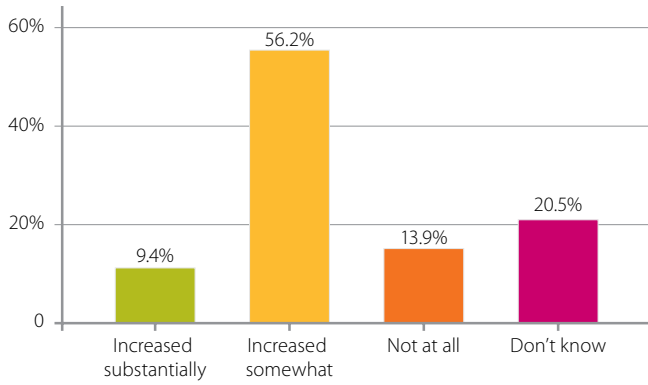
### RELATIVE IMPORTANCE OF MOTIVATORS AND BARRIERS



Further statistical analysis of response patterns between the various motivating factors reinforces the primary importance of comfort in motivating participation. This is reflected in the diagram above, that maps the interplay of various factors based on cross-correlations of responses. Grant availability is an underpinning factor in decisions to participate, though of course would not motivate participation in itself if people did not see the action as a good idea for its own reasons. These reasons are first comfort and then financial saving, or some combination of both, sometimes buttressed by the environmental dimension.

An additional dimension is the impact of the action on the value of the home. It seems likely to be a motivating factor given that 65% of respondents believe that the value of their home had increased as a result of upgrading.

## IMPACT ON VALUE OF HOME



Presumably, the introduction of mandatory Building Energy Ratings on property transactions since 2007 is part of the reason why more people are conscious of the concept of the energy efficiency standard of their home and its potential impact on the re-sale value of their home.



# CHAPTER THREE

## ARE HOMEOWNERS SATISFIED WITH THEIR EXPERIENCE?



### HIGHLIGHTS

- 90% of participants express satisfaction with the contractors who carried out their upgrade
- 98.5% would recommend HES to others

The Home Energy Saving scheme aims to build a new, large scale innovative market for strong upgrading of homes to high standards of energy efficiency. For this to succeed, three issues are central:

- » Homeowners must be satisfied with the improvements to their home
- » Homeowners must be satisfied with their contractors
- » Homeowners must be satisfied with SEAI and the grant process

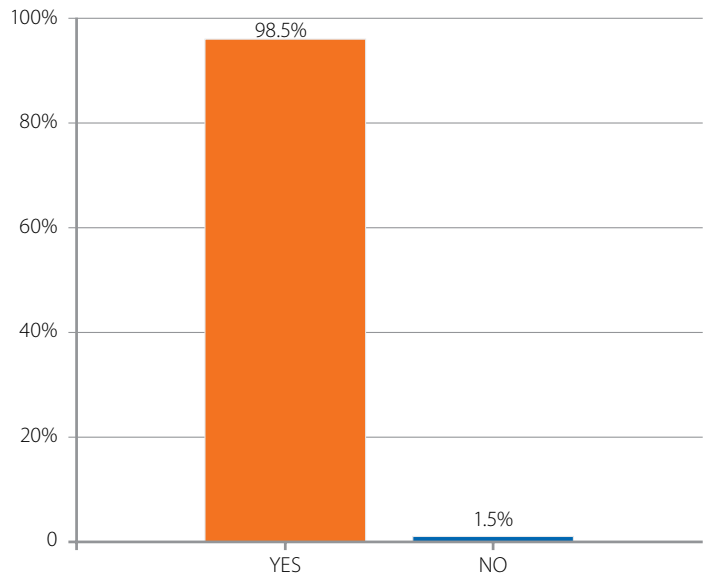
The experience of each HES participant in these three areas builds up the overall reputation of the scheme and of the idea of home upgrades, and if this reputation grows in a positive way, participation grows and a new culture of quality upgrades and interest in home energy efficiency can take root.

These three important questions are examined in the HES opinion survey.

### 1. SATISFACTION WITH UPGRADE WORKS

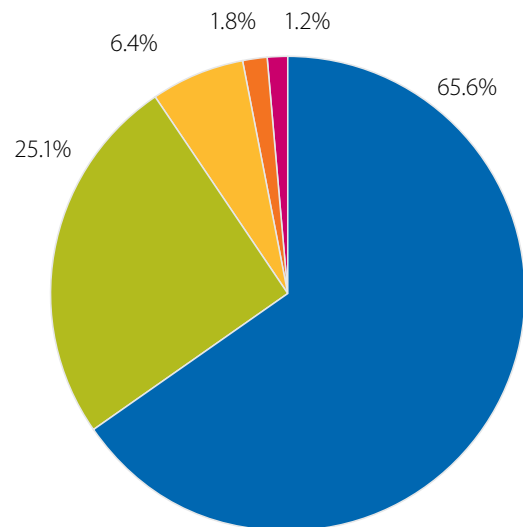
It is very positive to note that almost all participants (98.5%) were happy to recommend the scheme to others. And even when people didn't follow through on all measures they had planned, still 89% of those would recommend the scheme to others. These are obviously very encouraging findings.

### WOULD YOU RECOMMEND THE HOME ENERGY SAVING SCHEME TO OTHERS?



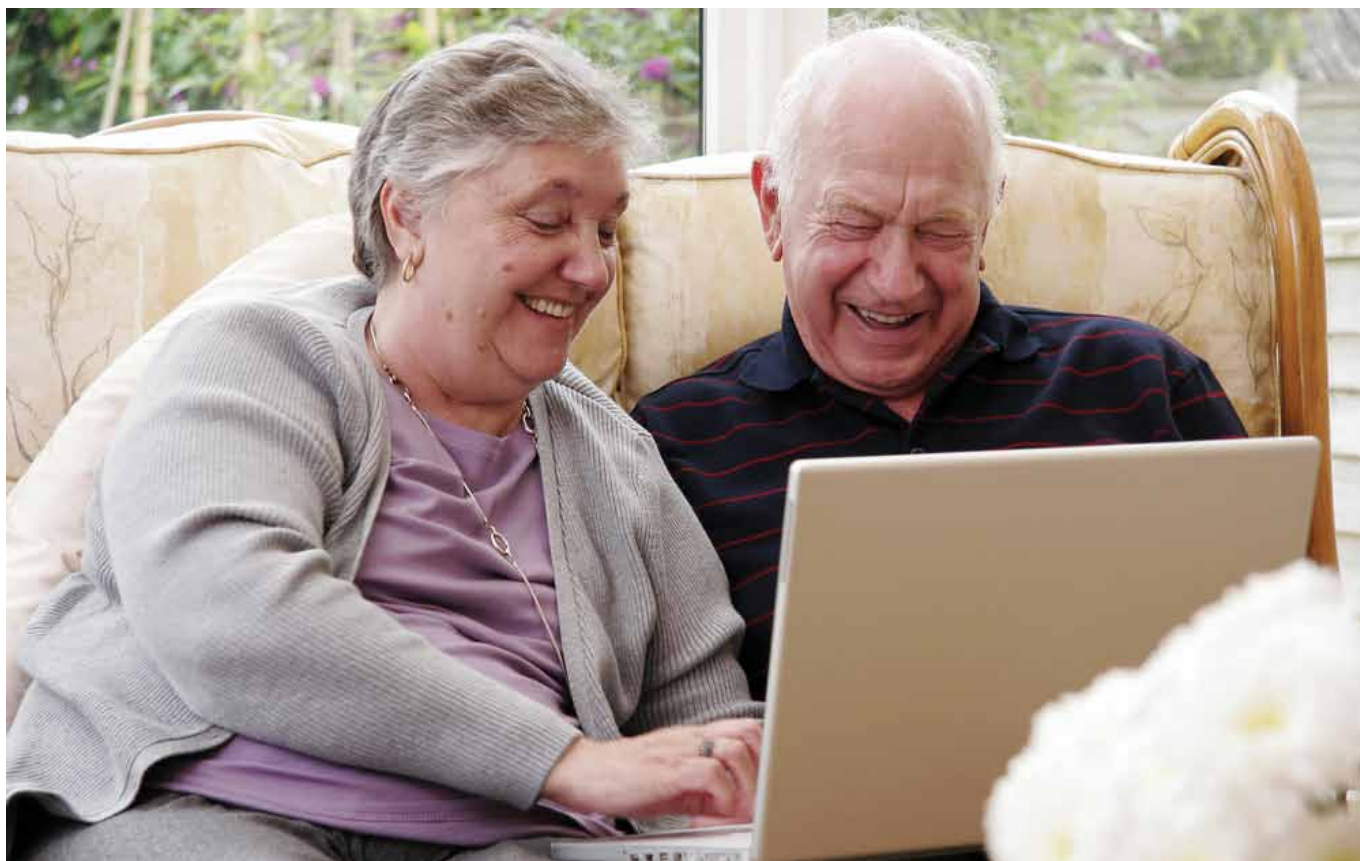
### 2. SATISFACTION WITH CONTRACTORS

90% of participants were 'very satisfied' (65%) or 'satisfied' (25%) with their contractor(s):



LEVEL OF SATISFACTION

- Very Satisfied
- Satisfied
- Average
- Dissatisfied
- Very Dissatisfied



Outside of the scheme, it is fair to say that the general perception of home improvement works and small contractors is not usually very positive. Many people have anecdotes about poor works carried out in their homes or messes left behind. Many people express a nervousness about inviting contractors into their homes to carry out works. In this context, a satisfaction rate of 90% with contractors in the first year or so of HES is very positive. It is evidence that the competitive market is driving good quality, well-priced and well-delivered actions, and may help explain why the scheme's popularity continues to grow.

There remains, of course, the question of the other 10%, and SEAI will keep a focus on driving quality and growing positive contractor experiences among householders.

Anecdotally, from HES and other incentive schemes, we are aware that HES registration represents a competitive advantage which prompts contractors to follow their local competitors in getting registered in order that they too can avail of the increased market opportunity. All of which draws more contractors in under the regulations of the scheme.

There are now over 2,700 registered contractors actively offering upgrades within the HES scheme. All of these are subject to the clear terms of scheme participation including governance, technical expertise and financial probity. Most importantly they are subject to the rigour of SEAI's quality assurance scheme. This is because it is essential that the growth we are seeing in home upgrades due to the success of HES is building a bank of positive experiences that enhance reputations and encourage further action.

### **3. CUSTOMER SATISFACTION WITH THE HES SCHEME**

Our first objective is to ensure that every customer who contacts the HES office comes away satisfied that they have been attended to in a helpful, efficient way. At every level of communication - phone, web or post - we want to set the highest standards of service.

The survey brought welcome confirmation of our success, with 95% of respondents reporting either an 'excellent' or 'good' overall experience with SEAI.

# CHAPTER FOUR

## CONCLUSIONS

Assessing the performance of HES through research is an important part of maintaining its quality and looking for areas that can be improved upon. This research has given us some valuable information on how we are doing, and it is gratifying to see a high level of satisfaction. However, the main purpose of research like this is to help us build new policies and programmes that take us beyond current levels of participation, both in terms of scale and depth. Our goal is to have more people undertaking deeper upgrades. In this regard, this survey makes a contribution by telling us some important things about those that have already chosen to participate. If we know their characteristics, their decision-making processes and their experiences, we learn something about the wider audience too.

This report is structured around three questions about HES and its participants, and has given us valuable information on each:

### **Who are the people who participate in HES?**

We now know that the scheme is appealing to quite a heterogeneous group of people and that the participants are wide ranging across age and income groups. It is also important to see people from the full spectrum of household income levels participating.

However we are not yet achieving the breadth of participation that we would like. The survey shows that single and low-income households are under-represented, as are younger adults and those in rented accommodation. Clearly, one of our objectives is to find ways to ensure our message of energy use awareness and reduction is being more widely conveyed and that such households are fully engaged, through specifically targeted programmes where necessary.

### **What influences their decisions to participate and their choice of actions?**

Perhaps one of the most interesting results that will inform how we position future communications is the emphasis that is coming through on the notion of people's emotional attachment to a warm, cosy house.

Even though energy savings scored higher than comfort as a motivational factor, our analysis suggests that there is real potential in using the comfort factor more extensively as a way to encourage wider participation. What is clear is that people don't make, nor subsequently evaluate, decisions based solely on economic considerations. Comfort and the emotional satisfaction of a warm home are bound up together and need to be addressed as an important part of the marketing mix.





A key issue raised in the survey responses is that of financing home energy upgrades. We see that most participants fund their share of the upgrade costs out of their own savings. Typically, this share is about €2,000. This is lower than we would like in that we want to see deeper interventions (more measures) being carried out in each home. Ideally, a home would undergo a set of measures that fully upgrades it and effectively future-proofs it for several decades as energy cost pressures and carbon reduction imperatives continue to grow in importance. This is being severely constrained by the current economic climate – no matter how good the proposition on paper in terms of return on investment from an upgrade, people simply do not have the money to invest.

How can we overcome the limitation of predominantly appealing to those with savings? If people could raise funds more confidently through more accessible loan offerings, would we then see a rise in participation and a greater uptake of stronger measures such as external wall insulation?

Driving the market to provide innovative financing solutions is an essential step to achieving these objectives of broadening the appeal of the programme and encouraging more significant and deeper investment. This is our highest priority in developing future programmes in the context of Government's National Energy Retrofit Programme.

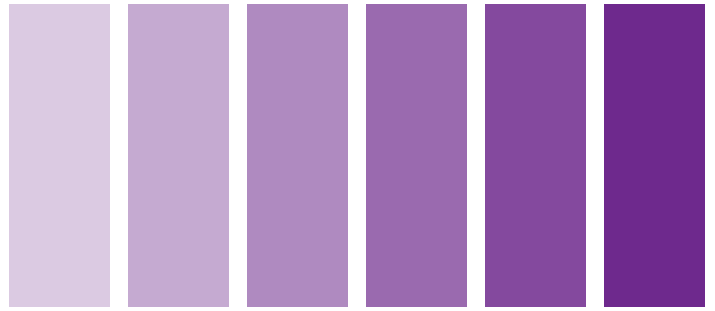
#### **What are their experiences and level of satisfaction?**

It is very encouraging to see the extent of positive experience of contractors and of SEAI. This creates a platform for building confidence and hence participation in the future.

SEAI will continue to emphasise customer experience in all its programmes, and will use tools such as surveys and customer feedback to monitor its performance and seek opportunities for improvement. We also intend to carry out further research among other stakeholder groups, such as HES registered contractors, to help us learn more about the programmes and their operation on the ground. This survey is an important element, but is by no means the complete story.

# APPENDIX

## QUESTIONNAIRE



### ABOUT YOU AND YOUR HOUSEHOLD? (CIRCLE YOUR ANSWERS)

#### 1. Are you:

Male      Female

#### 2. How old are you?

18-25      26-35      36-45      46-55      56-65      65+

#### 3. Which of the following describes your employment status at time of application?

Working full time (employed or self-employed)

Working part time

Working in the home

Unemployed

Retired

Other

#### 4. How many people live in your home?

Adults (over 18)      1    2    3    4    Over 4

Children                    1    2    3    4    Over 4

#### 5. What is the annual combined gross household income?

**Please include all income earning residents.**

Under €25,000

€25,000 - €50,000

€50,000 - €75,000

€75,000 - €100,000

€100,000 - €150,000

€150,000+

#### 6. What is the predominant heating source in your home?

Electricity      Oil    Renewables      Solid fuel (coal, turf)      Gas

**7. What is your estimated total annual spend on energy (oil, gas, electricity and solid fuel)?**

Less than €1,000

€1,000 - €1,500

€1,500 - €2,000

€2,000 - €2,500

€2,500 - €3,000

€3,500+

**8. Did you make the application for:**

A rental property

Your principal residence

Your secondary residence/holiday home

**9. Is there a loan or mortgage attached to the property for which the application was made?**

Yes    No

## APPLICATION PROCESS

**1. When making your grant application(s), what were your key considerations (you may tick more than one) in choice of measure? You may ignore measures not applied for.**

	Roof/Attic	Wall	Heating controls/heating controls & boiler upgrade
Ease of installing measure/lack of disruptive impact			
Level of grant available			
Environmental benefit			
Energy savings			
Cost of measure			
Technical feasibility of measure in your house			
Comfort gains			

**2. How did you fund the measures (you may tick more than one answer)?**

Savings

Term loan

Mortgage top up

Other borrowings

### 3. How would you rate the information available on the SEAI website?

Excellent   Good   Average   Poor   Very poor   Don't know/not relevant

### 4. How would you describe the SEAI call centre service?

Excellent   Good   Average   Poor   Very poor   Don't know/not relevant

### 5. When making an application would it be useful to have more information on:

	Very useful	Useful	Somewhat useful	Not particularly useful	Not at all useful
The Building Energy Rating improvements and energy savings of measures					
Technical details on measures					
Financing options to pay for measures					
Costs of measures					
Contractors					

## STATUS OF YOUR APPLICATION

### 1. Which of the following best describes the current status of your grant application(s)?

You have decided not to proceed with any measures

All measures have been undertaken

You have decided not to proceed with some measures

## REASONS FOR NOT FOLLOWING THROUGH WITH ANY MEASURES

### 1. What were your reasons for not following through with any of the measures you applied for?

You may tick more than one reason.

	Roof/Attic	Wall	Heating controls/heating controls & boiler upgrade
Potential disruptive impact of measures			
No time to follow through			
Other spending priorities			
Measure did not offer value for money			
Loan application rejected by bank			
Lack of own funds			

## REASONS FOR NOT FOLLOWING THROUGH WITH SOME MEASURES

### 1. What were your reasons for not proceeding with some of the measures you applied for?

You may tick more than one reason.

	Roof/Attic	Wall	Heating controls/heating controls & boiler upgrade
Potential disruptive impact of measures			
Measure did not offer value for money			
Loan application rejected by bank			
No time to follow through			
Other spending priorities			
Lack of own funds			

## IMPACT OF INSTALLED MEASURES

### 1. How would you rate your level of satisfaction with the contractor(s) who installed the measures?

Very Satisfied      Satisfied      Average      Dissatisfied      Very dissatisfied

### 2. Was your contractor in a position to provide you with information on maximising the energy savings potential of the installed measure(s)?

	Yes	No	Don't know
Wall			
Heating controls/heating controls & boiler upgrade			
Roof/Attic			

### 3. How would you rate the increased comfort achieved in your home from the installed measure(s)?

Very Satisfied      Satisfied      Average      Dissatisfied      Very dissatisfied

### 4. What are your estimated energy savings on your bill achieved from the installed measure(s)?

0-10%      11-25%      26% or more      Don't know

### 5. Would you say the investment has increased the value of your home?

Increased substantially      Increased somewhat      Not at all      Don't know

## INTEREST IN FURTHER ENERGY EFFICIENCY MEASURES

### 1. Would you consider making further investments in energy efficiency improvements to your home?

Yes    No

## MOTIVATION FOR MAKING FURTHER INVESTMENTS

### 1. How important would the following factors be in motivating you to invest in further measures?

	Very Important	Important	Somewhat important	Not particularly important	Not at all important
To improve the BER of your home					
To increase the comfort level in your home					
To improve the environment					
To reduce your energy bills					
The availability of a grant					

## FACTORS PREVENTING FURTHER INVESTMENTS

	Very Important	Important	Somewhat important	Not particularly important	Not at all important
Lack of own funds					
Loan application rejected by bank					
Measure did not offer value for money					
Other spending priorities					
Potential disruptive impact of measures					

## OVERALL SATISFACTION

### 1. Would you recommend the Home Energy Saving scheme to others?

Yes    No

### 2. How would you rate your overall experience of SEAI?

Excellent    Good    Average    Poor    Very poor    Don't know

### 3. How did you hear about the Home Energy Saving scheme?

Other    Contractor advertising    A friend or colleague    On-line SEAI advertising





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Co-funded by the Irish Government  
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